



2025

**SECURITY &
RESILIENCE
SECTOR**

UK OUTLOOK

THE UK SECURITY & RESILIENCE SECTOR

faces a shifting threat landscape, shaped by emerging technologies, changing crime patterns, and geopolitical uncertainty.

TURNOVER IN UK SECURITY & RESILIENCE REACHED

£24BN
IN 2024

GROWTH OF
176%
BETWEEN
2014 & 2024

As AI-driven cyber risks grow, national resilience planning evolves, and the Government places greater emphasis on economic security, industry must navigate new regulatory and commercial pressures.

The coming years will require greater investment in innovation, collaboration with government, and a proactive approach to securing the UK's critical infrastructure and supply chains.

The UK security and resilience sector is undergoing three fundamental shifts:

TECHNOLOGY AND CYBERSECURITY

AI is reshaping both defensive and offensive security theatres.

PUBLIC SAFETY AND NATIONAL RESILIENCE

Changing patterns in terrorism, organised crime, and emergency planning challenges require urgent policy responses.

GEOPOLITICS AND ECONOMIC SECURITY

The UK's defence and security priorities are evolving in response to spiralling global instability.

For industry, these changes bring both **challenges and commercial opportunities** starting with investment in cyber defences through to shaping the next generation of security technologies.

IN 2024, THE ECONOMIC
FOOTPRINT OF THE UK
SECURITY & RESILIENCE
SECTOR INCLUDES:



148,250
EMPLOYEES

GROWTH OF
89%
OVER 10 YEARS



£11.7BN
IN VALUE ADD



GROWTH OF
134%
OVER 10 YEARS

GROWTH OF
244%
OVER 10 YEARS



£11.7BN
IN EXPORTS

All 2024 data points are estimates by Oxford Economics and ADS.

OUTLOOK FOR THE UK SECURITY & RESILIENCE SECTOR

AI, CYBER AND CRIME: THE NEXT FRONTIER

AI is transforming security, both as a **defensive tool** and an **enabler of new threats**. Cybercriminals are increasingly using AI to automate attacks, manipulate digital identities, and conduct large-scale fraud. Deepfake technology is already being used to target businesses and individuals, posing a rising threat to both political stability and commercial security.

The **Cyber Security and Resilience Bill** will place greater obligations on companies to safeguard digital infrastructure. Businesses should prioritise investment in **AI-driven cybersecurity**, with security requirements linked to deepfake detection and biometric identity systems: providing opportunity for industry alongside a need to keep pace with evolving threats.

The nature of crime is changing. Violent crime rates have declined but theft, fraud, and organised retail crime are on the rise. New security solutions, such as **electronic article surveillance** and **biometric authentication**, are essential to tackling these challenges. Policing continues to grapple with the challenges and opportunities of **managing ever larger sets of data**.

Key Industry Implications

- As AI-driven cyber threats grow, businesses must enhance their digital resilience.
- The Cyber Security and Resilience Bill will introduce stricter obligations.
- Investment in biometric and deepfake detection technologies needs to increase.

PUBLIC SAFETY AND RESILIENCE: PROTECTING THE HOMELAND

The introduction of **Martyn's Law** in the UK will require organisations to strengthen protective security in public spaces, generating demand for **security tech, crowd monitoring systems, and risk assessment tools**.

Counter-terrorism policy is undergoing a **strategic refresh** with the Government expected to take a more proactive approach, leading to greater investment in **surveillance and behavioural analytics**. This Government also has a mission to **deliver Safer Streets** and **tackle violence against women and girls (VAWG)**, which will shape future investment.

The UK continues to reassess its approach to national resilience, which will shape policy in areas such as **disaster response and infrastructure resilience**, meaning a drive in industrial capabilities that support crisis response, including surveillance, communications, and protective equipment.

The **Strategic Security Review** will define key priorities for UK security in the years ahead. However, for industry, uncertainty remains over whether this will translate into tangible opportunities.

Key Industry Implications

- Martyn's Law will drive demand for security compliance solutions.
- Counter-terrorism policy changes could require enhanced security infrastructure.
- A new approach to national resilience will drive interest in crisis management technologies.

GEOPOLITICS AND ECONOMIC SECURITY: INDUSTRY'S ROLE

Security and defence companies are set to have a greater role in the UK's economic and foreign policy, particularly in response to geopolitical instability. A potential **UK-EU defence and security pact** should open new opportunities for industry, particularly in **cybersecurity, border security, and intelligence cooperation**.

Economic security has moved up the political agenda, with greater scrutiny on **foreign investment in sensitive sectors** and an increased focus on supply chain resilience.

The **UK-US relationship and Five Eyes alliance** remain critical to defence and security partnerships but concerns over China's cyber capabilities and influence in global supply chains are likely to shape future policy.

The UK's **100-year partnership with Ukraine**, aimed at supporting **reconstruction and security cooperation**, presents opportunities for UK businesses in **defence, infrastructure, and border security**.

Key Industry Implications

- UK-EU defence and security cooperation presents commercial opportunities.
- Foreign investment and economic security policies will shape new industry regulations.
- Energy security investment will require resilience and protective measures.

WHAT NEXT FOR INDUSTRY?

Businesses operating in the UK security & resilience sector must be prepared for:

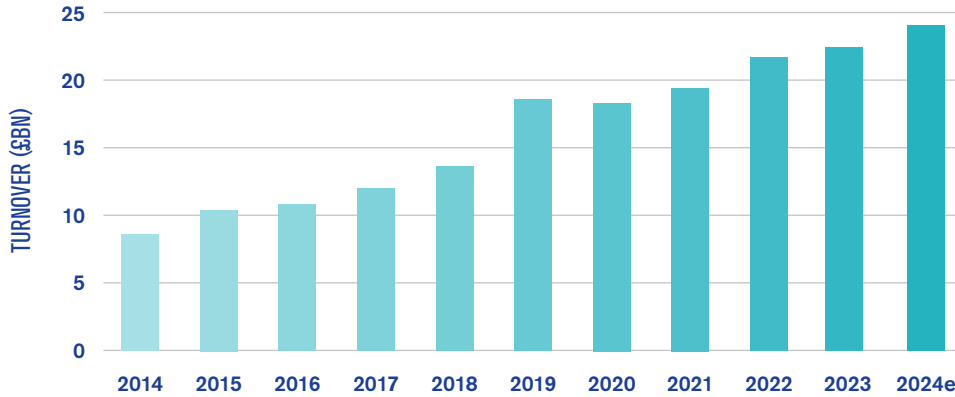
- **New Compliance Challenges**
Upcoming legislation will impose stricter cyber and protective security requirements.
- **Geopolitical Uncertainty**
Industry working proactively with government on strategic security initiatives.
- **Technology-Driven Threats**
Investment in AI security, biometrics, and resilient solutions will define market leaders.

THOSE WHO ANTICIPATE THESE
SHIFTS AND ACT EARLY WILL BE
BETTER POSITIONED TO SUPPORT
THE UK'S LONG-TERM SECURITY
AND RESILIENCE AGENDA.



OPPORTUNITIES FOR CONTINUED SECTOR GROWTH

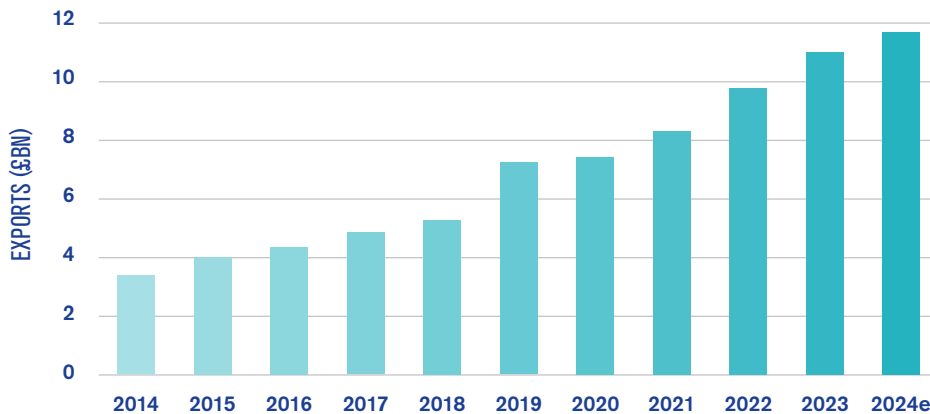
Turnover of the security & resilience sector



£24BN
TURNOVER IN 2024

GROWTH OF
176%
OVER 10 YEARS

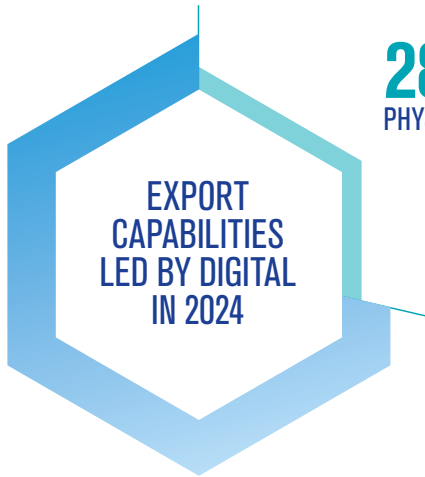
Exports from security & resilience



EXPORT SALES
ACCOUNT FOR
49%
OF SECTOR TURNOVER

EXPORTS GREW
244%
OVER THE LAST DECADE

72%
DIGITAL



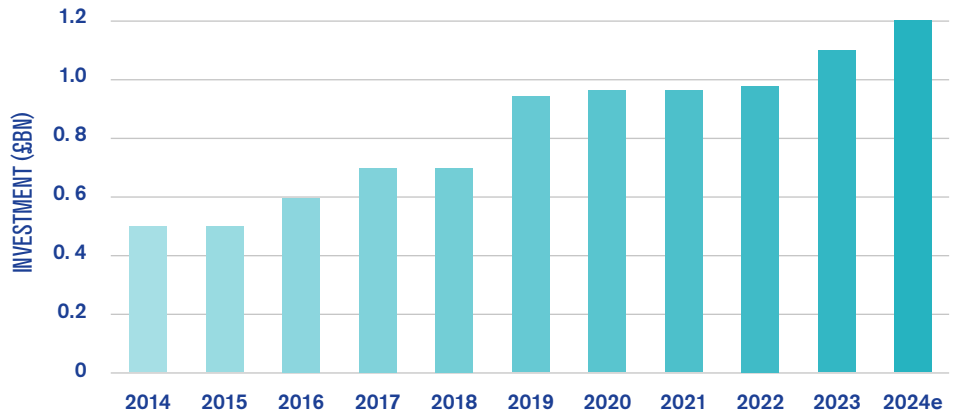
28%
PHYSICAL



INNOVATION LED GROWTH



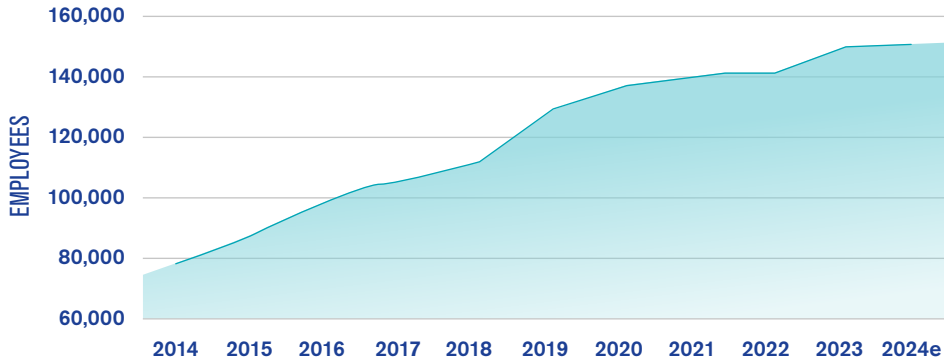
Investment in R&D



**SECURITY &
RESILIENCE SECTOR**
INCREASING JOBS
AND PRODUCTIVITY



Employment in the security & resilience sector



148,250

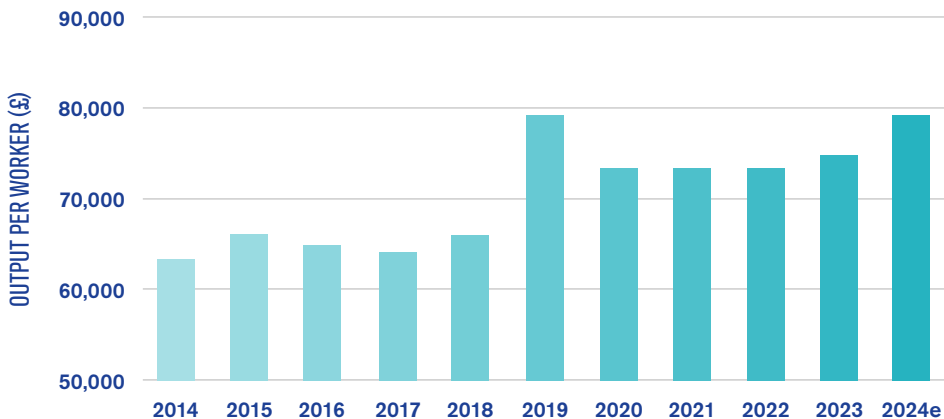
PEOPLE DIRECTLY EMPLOYED
IN THE SECTOR IN 2024

GROWTH OF

89%

IN THE LAST 10 YEARS

Productivity in the security & resilience sector



ANNUAL
OUTPUT PER
WORKER

£79K

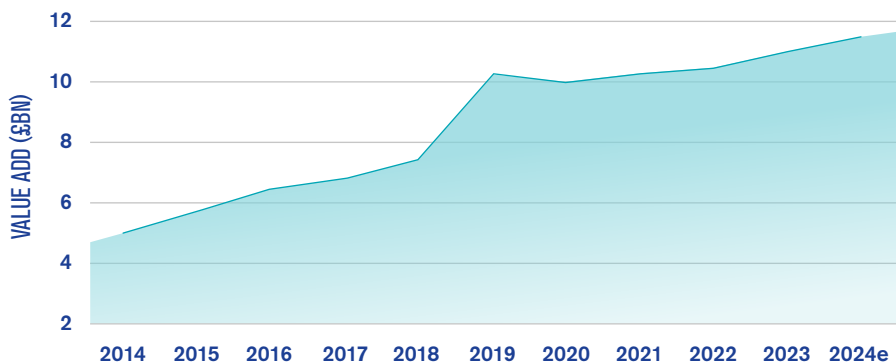
SECTOR
PRODUCTIVITY
HAS GROWN

24%

OVER 10 YEARS

CONTRIBUTING SOCIAL VALUE TO THE UK ECONOMY

Security and resilience value add



£**11.7**BN
VALUE ADD IN 2024

GROWTH OF
134%
OVER 10 YEARS

AVERAGE SALARY

£**49**K
IN 2024

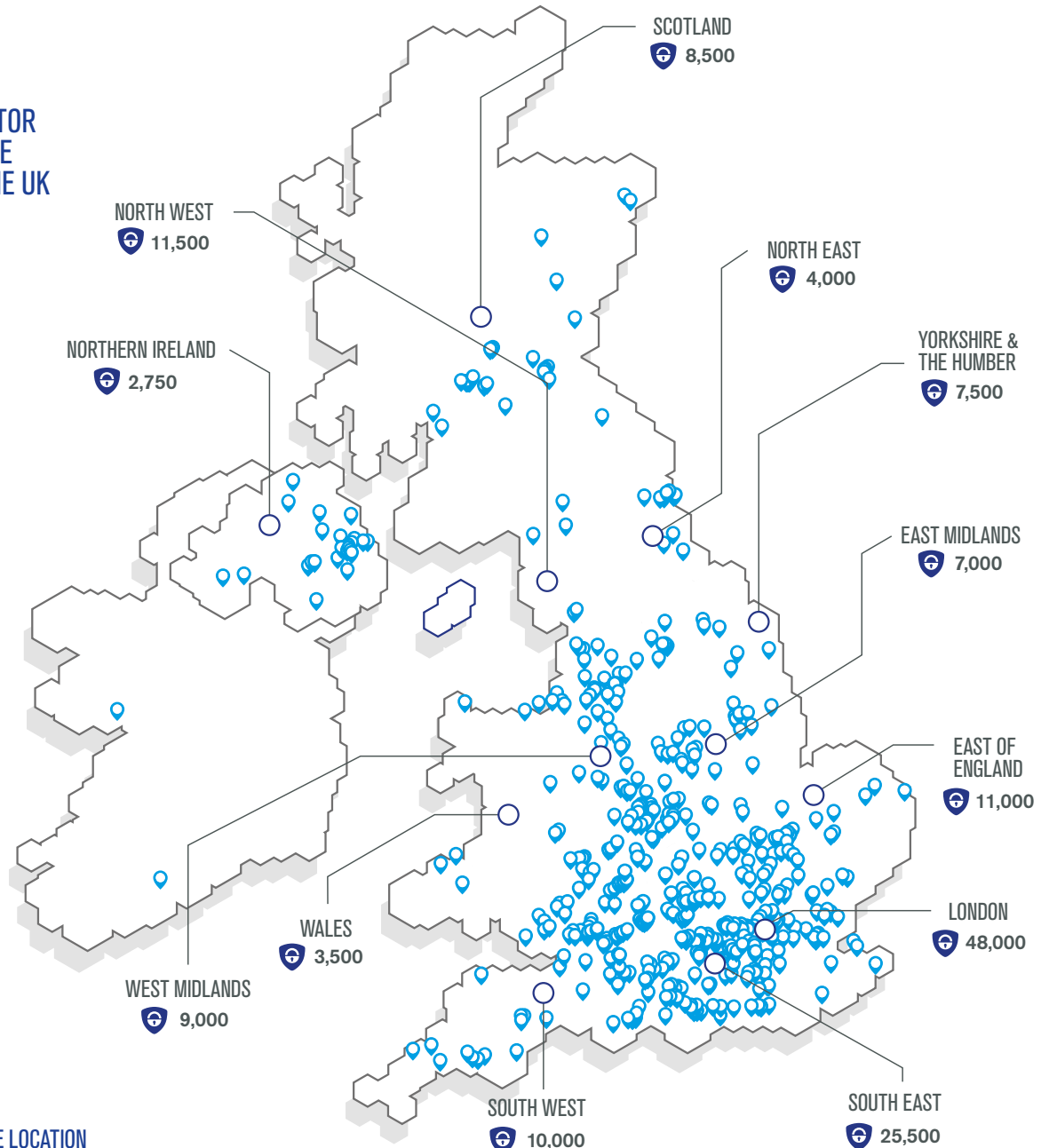
AN INCREASE OF
47%
OVER 10 YEARS

31%
HIGHER THAN
THE UK AVERAGE

50%
OF JOBS ARE LOCATED
OUTSIDE OF LONDON
AND THE SOUTH EAST



THE SECURITY & RESILIENCE SECTOR EMPLOYS PEOPLE THROUGHOUT THE UK



 REPRESENT THE LOCATION OF ADS SECURITY & RESILIENCE MEMBERS



ADS is the trade association for the UK's aerospace, defence, security, and space industries, representing more than 1,400 members. We work with those sectors to secure the UK's advantage, enhance our international positioning as a go-to destination for innovation, and deliver on our sustainable leadership goals.

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Sources and methodologies

ADS Security Outlook 2025 uses data estimates for 2024 data compiled by Oxford Economics in 2025, based on publications from UKDSE, using Westlands Advisory insights as well as ADS own sources.

Images courtesy of Excelebrate, Vizgard and Wind Racers.